

Managing Placements on the WEB Redesign Project (MPOWER)



WISCONSIN DEPARTMENT OF
CHILDREN AND FAMILIES

With



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Project Overview

Business Drivers

- Individuals in CMF placements are sometimes receiving eligibility closure notices, even though they are still eligible by policy
- W-2 eligibility and case management is a disjointed workflow across CWW and WP mainframe screens
- System-generated letters related to Placement, EFT, Vendor Payment, and Held Benefits are outdated or don't exist and create customer confusion
- Individuals are sometimes remaining in CMC and other paid placements longer than policy allows, resulting in overpayments
- The current Work Programs screens are outdated and modernization is a Bureau priority

Project Goals

- Enhance system usability
- Streamline business processes
- Improve system-policy alignments
- Reduce overpayments
- Improve customer communication
- Increase efficiency of technology maintenance

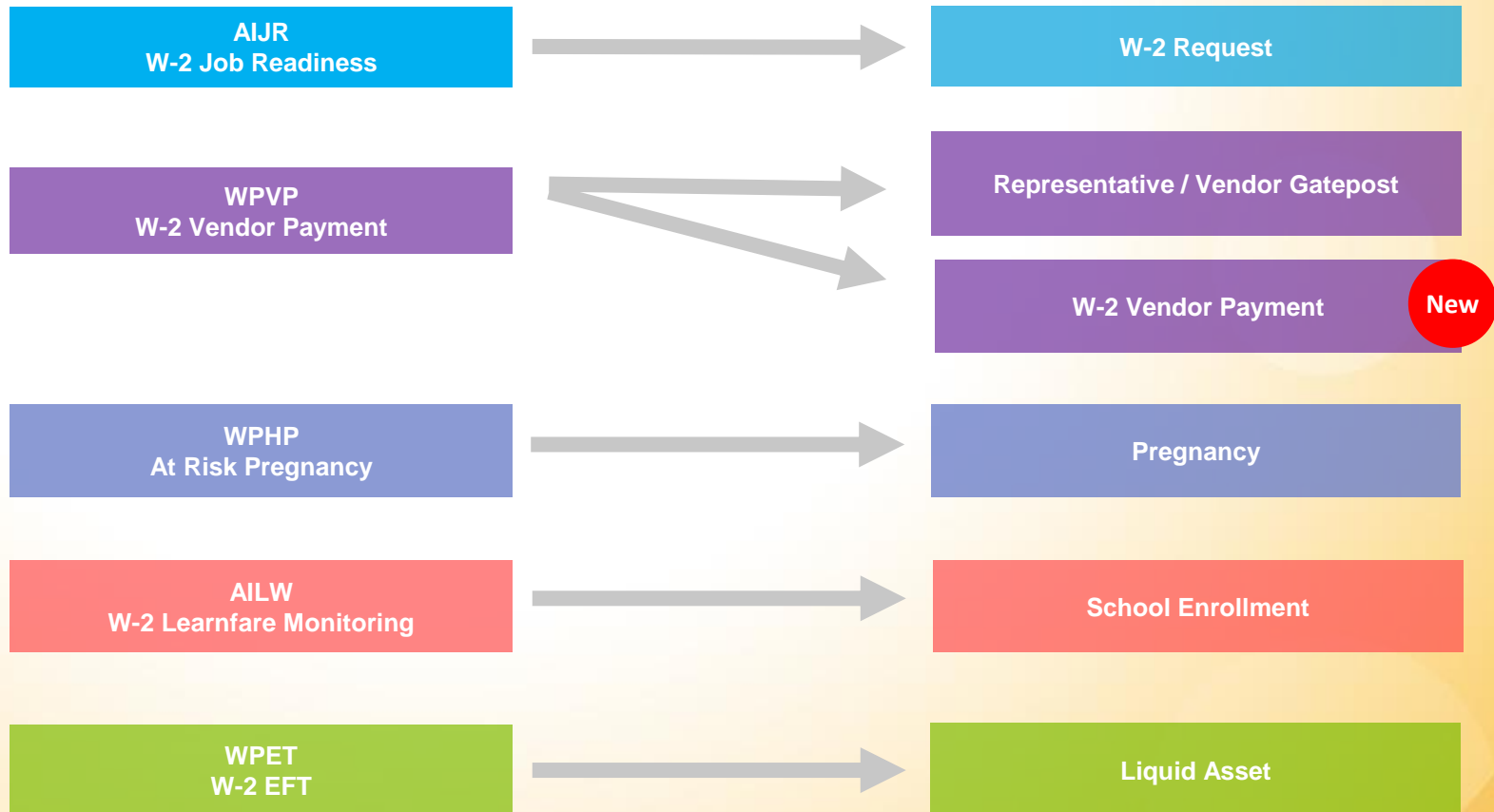
Project Scope

- Move the following mainframe functions to CWW:
 - Referrals (including Upfront)
 - Placement
 - EFT
 - At Risk Pregnancy
 - Learnfare Monitoring
 - Vendor Payment
 - Two Parent Participation
 - Hold Payment
- Adjust eligibility processes to support individuals placed in CMF
- Modify placement process to better enforce placement policies
 - System will auto close CMC on the 56th day and all other placements on the last day of the month eligibility was open
 - Support future begin dating and future end dating of placements
- Modernize and enhance correspondence related to Work Program information
- Make necessary enhancements to ACCESS to support CWW changes

Screen Mapping: Pre-Eligibility

Mainframe Screens

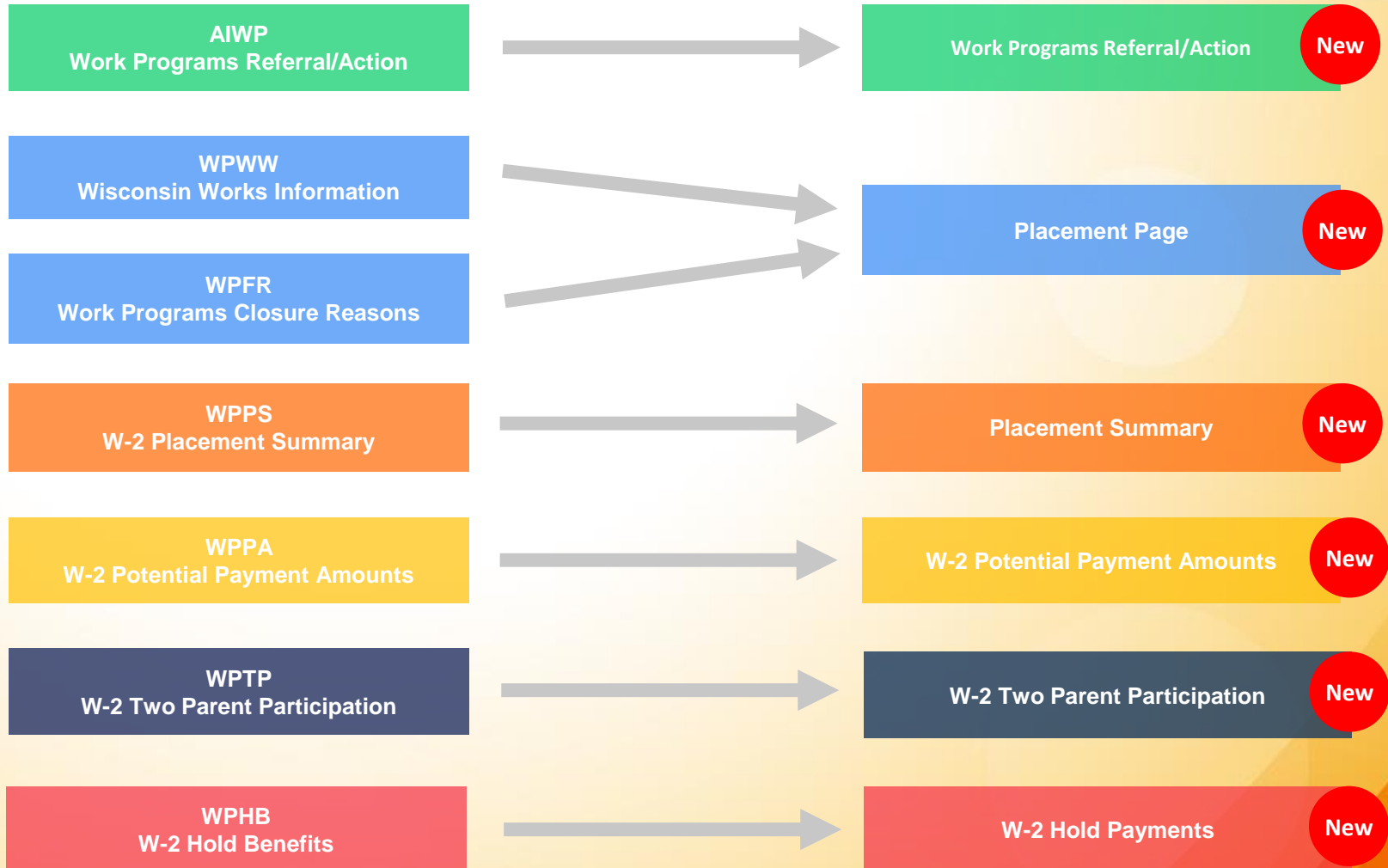
CWW Pages



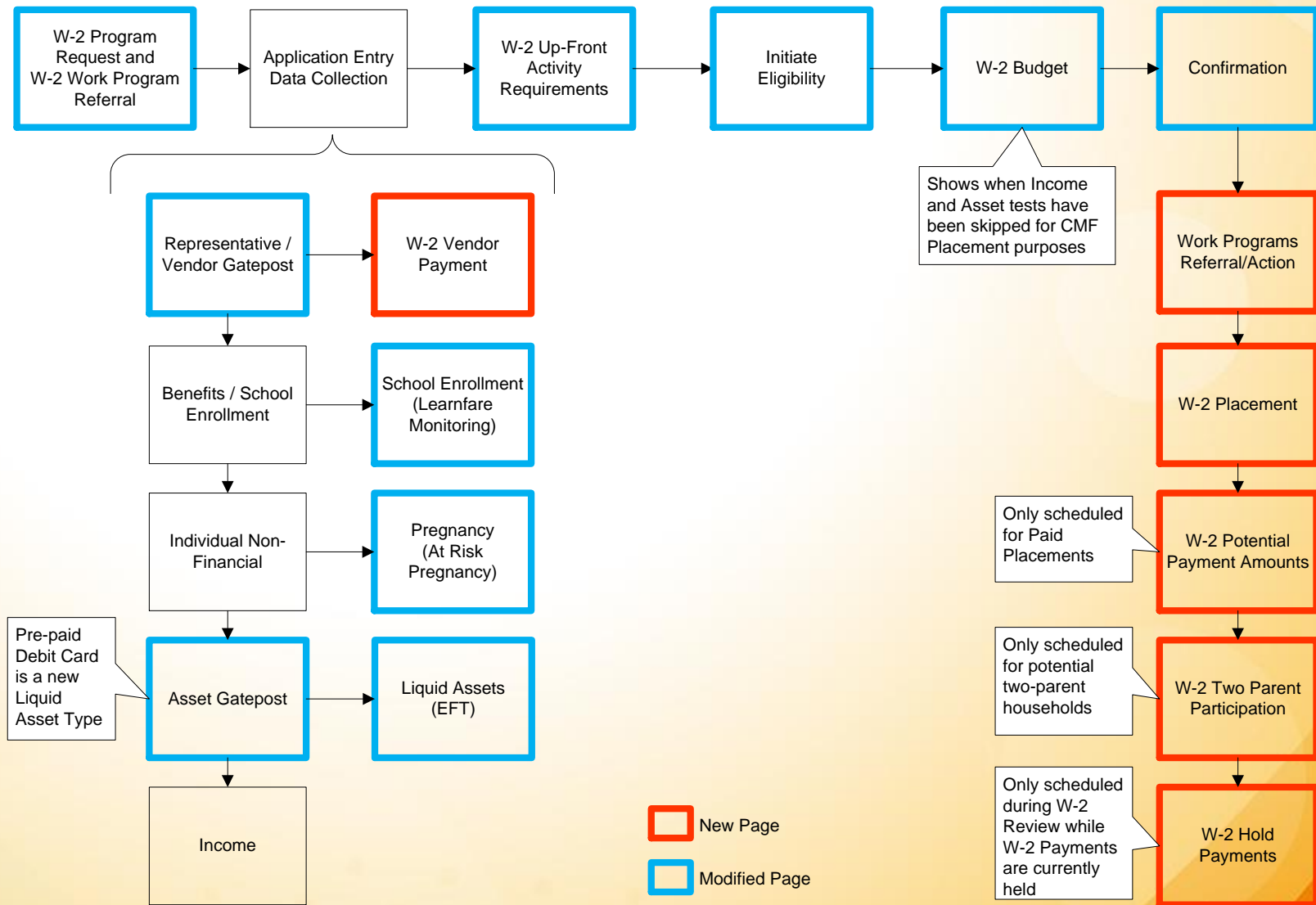
Screen Mapping: Post-Eligibility

Mainframe Screens

CWW Pages



High-level CWW Driver Flow



Page Mock-Ups

Application Entry

Current Page – AIJR W-2 Job Readiness

AIJR
CASE: 4003035941

W2 JOB READINESS

WORKER: XCT266
CASE STATUS: OPEN

10/28/15 10:54
XCT266 K CLOUGH
CASE MODE: ONGOING

SEL	NAME		STATUS	PROGRAM	OFFICE NUM
—	TEST	WPOP-CLIAM-TEN	E	JO	0721

PF24: INITIATE ASSESSMENT

-----INDIVIDUALS-----
01 TEST W (PP) 02 DAU W (DAU)

NEXT TRAN: _____ PARMS: 4003035941_____

MB + a

17/014

W-2 Request Page with W-2 Work Program Referral for Assessment (AIJR)

W-2 Request [Cancel] [Reset]

W-2 Program Request

Effective Period

• Begin Month: 03 / 2016 Last Updated: 03/04/2016

Request Details

• W-2 Request Date: 03 / 04 / 2016 • Requesting this Program / Subprogram of Assistance? Yes

Target Type: Target Individual:

Enter New Begin Month MM / YYYY Go

W-2 Work Program Referral For Assessment

Individual: Refer Selected Individual

Subsidized Housing Information

Last Updated: 03/04/2016

• Effective Month: 03 / 2016 • Low Income Subsidized Housing Status: 1 - PUBLIC HOUSING

Enter New Begin Month: MM / YYYY Go

Updated on or before MM / DD / YYYY Go

Enter Begin Month for New Data: MM / YYYY

Add Case Comment [Cancel] [Previous] [Next]

Effective Month for Subsidized Housing will prepopulate the Effective Month

Individual can be referred at time of W-2 request

If there are up-front requirements the worker will be required to process a WP referral prior to assigning up-front

Current Page - WPVP W-2 Vendor Payment

```
WPVP                                W-2 VENDOR PAYMENT                                01/02/15 14:34
                                                                XCTA5B R NURANI
CASE: 7002730274                    FEP: XCTA5B                                LAST UPDATED: 12 30 14
END REASON: _____

VENDOR NUMBER: 000000972
      TIN: *****1718
VENDOR NAME: ABC CORP
VENDOR TYPE: CO CORPORATION

      NUMBER    UNIT  DIR   ST/RURAL RT/BOX#   SUF  QUAD  APT
VENDOR ADDRESS: 18178                                MAIN  ST

      CITY: MADISON          STATE: WI ZIP: 53703

VENDOR AMOUNT:      20    VENDOR REASON: VL

PARTICIPANT'S ACCOUNT NUMBER WITH VENDOR: _____

PF13: ADD NEW VENDOR PAYMENT
NEXT TRAN: _____  PARMS: 7002730274_____
```

W-2 Vendor Payment Page (WPVP) and Vendor Lookup

W-2 Vendor Payment Mock-Up Cancel Reset

Record Management

Delete Reason: Last Updated: 05/01/2015

Vendor Information

*Vendor Number:

TIN/SSN:

Vendor Name: **ABC CORP**

*Vendor Amount: \$

Vendor Type: **CORPORATION**

*Vendor Reason:

Vendor Address: **18178 MAIN STREET
MADISON, WI. 53703**

Participant's Account Number With Vendor:

Updated on or before:

Cancel Previous Next

Vendor Find tool allows worker to easily search for vendors by various criteria

Vendor Find Mock-Up Close

Vendor Query

☒ Vendor Name: ☒ Starts With ☐ Contains

☐ TIN:

☐ SSN: - -

Search Results

Vendor Number	Vendor Name	Vendor Type	Vendor Address
972	ABC CORP	CORPORATION	18178 MAIN STREET MADISON, WI. 53703

Current Page – WPHP At Risk Pregnancy

```
WPHP                      AT RISK PREGNANCY                      10/28/15 10:41
                                                                XCT266 K CLOUGH
DC:  _  SEQ: 001                      UPDATED DATE: 04 21 15
                                                                LAST UPDATED BY: XCT266

CASE: 4002772241
PIN : 4008014373      NAME: TEST                      ARP-NO-SNCATION

IS THIS AN AT RISK PREGNANCY?                      : Y  VR: DR
ARE YOU UNABLE TO WORK DUE TO THIS AT RISK PREGNANCY?  : Y  VR: DR

DATE DOCTOR DETERMINED AT RISK AND UNABLE TO WORK: 04 20 2015  VR: DR
DATE ALL MEDICAL DOCUMENTATION RECEIVED IN AGENCY: 04 20 2015

THIRD TRIMESTER BEGIN DATE: 03 30 2015      EXPECTED DELIVERY DATE: 06 30 2015
MARITAL STATUS: SI

DO YOU HAVE CUSTODY OF A MINOR CHILD IN YOUR HOME?      : N

IS PARTICIPANT ELIGIBLE FOR AT RISK PREGNANCY PLACEMENT? : Y

PF13 NEW EPISODE PF14 WPWW PF15 WPPA PF24 PROCESS UPDATES
NEXT TRAN:  _  PARMS: 4002772241
CDK - END-DATE ARP PLACEMENT ON WPWW PRIOR TO ADDING NEW ARP SEQ ON WPHP
MA + a 22/017
```

Pregnancy Page with At Risk Pregnancy Information (WPHP)

Pregnancy Cancel Reset Total: 1

Effective Period

• Begin Month: 03 / 2016 End Month: MM / YYYY Last Updated: 03/15/2016

Delete Reason:

Additional Information

• Individual: DJ TANNER 36F PP

• Pregnancy Verification: DS - DOCTOR'S STATEMENT • Pregnancy Verification Date: 03 / 09 / 2016

• Fetus Number: • Fetus Number Verification: NQ - NOT QUESTIONABLE

• Due Date: 04 / 10 / 2016 • Due Date Verification: NQ - NOT QUESTIONABLE

• Third Trimester Begin Date: 01/17/2016

Pregnancy End Date: MM / DD / YYYY

At Risk Pregnancy Information

Is this an at risk pregnancy and are you unable to work? Y - Yes

Date determined to be at risk and unable to work by doctor: 03 / 11 / 2016 Verification: AV - AWAITING VERIFICATION

Is participant potentially eligible for At Risk Pregnancy Placement? No

Enter New Begin Month: MM / YYYY Go

Individual: DJ TANNER 36F PP Updated on or before: MM / DD / YYYY Go

Add Case Comment Cancel Previous Next

System will auto populate the third trimester begin date when the due date is entered

Streamline s data collection process by collecting ARP info along with other pregnancy details

Redundant fields have been eliminated to save workers time.

Asset Gatepost Page

Asset Gatepost Mock-Up Cancel Reset

Effective Period
Last Updated: 04/01/2015

Automated Case Processing Asset Information
*Has the asset information from the latest ACP application PDF been processed?

Liquid Asset

Does anyone in your household have any of the following Liquid assets?

* Cash:	<input type="text"/>	* Tax Shelter Account:	<input type="text"/>
* Savings Account:	<input type="text"/>	* Christmas Club:	<input type="text"/>
* Savings Certificate:	<input type="text"/>	* IRA Account:	<input type="text"/>
* Checking Account:	<input type="text"/>	* Keogh Plan:	<input type="text"/>
* Prepaid Debit Card:	<input type="text"/>	* Credit Union:	<input type="text"/>
* Trust Funds:	<input type="text"/>	* Tax Refund:	<input type="text"/>
* Stocks and Bonds:	<input type="text"/>	* Escrow Account for Home Sale:	<input type="text"/>
* EBD Medicaid Annuity:	<input type="text"/>	* Money Owed:	<input type="text"/>
* US Savings Bond:	<input type="text"/>	* Child Support DEFRA Disregard:	<input type="text"/>
* Money Market:	<input type="text"/>	* Excess Over Life of Grant:	<input type="text"/>
* Monthly Excess Over Grant:	<input type="text"/>	* Other:	<input type="text"/>
* Special Resource:	<input type="text"/>		

Vehicle Asset
* Does anyone in your household own or is anyone buying a Vehicle (car, truck, boat, snowmobile, other)?

Real Property Asset
* Does anyone in your household own or is anyone buying real property / life estate / mortgage / land contract?

Personal Property Asset
* Does anyone in your household own or is anyone buying Personal property of exceptional value?

Burial Asset
* Does anyone in your household own or is anyone buying a Burial asset?

Lump Sum Received
* Has anyone in your household received a lump sum in the last three months?

Life Insurance Asset
* Does anyone in your household own or is anyone buying Life Insurance?

Transfer/Divestment Asset
* Has anyone transferred or divested, sold or given away real property or any other assets?

- For Institutions/Waivers, this applies to within the last 3 years for Real Property and other assets and also applies for a transfer involving a trust within the last 5 years.
- For FoodShare, this only applies to transfers or divestments in the past 3 months and does not include real property, vehicles, or other assets that are excluded for FoodShare.
- For CTS, this only applies to transfers or divestments in the past 1 year.

Based on client's response, populate blank fields as N

Add Case Comment Cancel Previous Next

Supports the liquid asset collection of Prepaid Debit Cards

Current Page – WPET W-2 EFT

```
WPET                                W-2 EFT                                01/02/15 14:33
                                XCTA5B R NURANI
CASE: 7002730274                FEP: XCTA5B                LAST UPDATED: 12 30 14
END REASON: ____

FINANCIAL INST CODE: AI7  FINANCIAL INST NAME: TCF NATL BANK WIS-54TH ST

      NUMBER  UNIT  DIR  ST/RURAL RT/BOX#  SFX  QUAD  APT
FINANCIAL INST 4061      N   54TH      ST
  ADDRESS:
    CITY: MILWAUKEE      STATE: WI ZIP: 53218

ROUTING NUMBER: 275071385
  ACCOUNT TYPE: C      ACCOUNT NUMBER: 124252437_____
    ACCOUNT HOLDER NAME: MITCH_____ TUMBLER_____

PF13: ADD NEW EFT
NEXT TRAN: _____ PARMS: 7002730274_____
```


Liquid Asset page with W-2 EFT Information (WPET)

Increase account number length to support accounts with up to 17 characters and require account numbers and Financial Institution Name for Checking, Savings and Debit Card Assets.

Enhances program integrity by requiring assets used for EFT to be included in eligibility determination

Liquid Assets Mock-Up Cancel Reset

Selected Assets To Be Entered

CH PR SA

Effective Period
Begin Month: 06 / 2015 End Month: MM / YYYY Last Updated:
Delete Reason: [v] [e]

Additional Information
Individual: SUPER B MAN 114M PP Sequence: 0
Type: PR - PREPAID DEBIT CARD Verification: BS - BANK STATEMENT
Jointly Owned? N - No Available? Y - Yes
Burial? [v] [e] Verification: BS - BANK STATEMENT
Asset Amount: \$ 149 .39

Independence Account Information
Independence Account? [v] Registration Date: MM / DD / YYYY [v] [e]
Pre-independence Account Balance Amount: \$ [v] [e]

Financial Institution Name And Address Information
Account Number: 1234567890
Name: Chase Bank
Address: [v] [e]
City: [v] [e] State: [v] [e]
ZIP: [v] [e]

W-2 EFT Information
Use for W-2 EFT? Y - Yes [v] [e] Routing Number: 987654321
Confirm Account Number: 1234567890 Confirm Routing Number: 987654321

Jointly Owned Assets
Individual Verification
First Name MI Last Name Suffix
EBD-MA Related Applicant / Recipient
Delete Delete Reason
First Name MI Last Name Delete Verification EBD-MA

Automatically create asset page for joint owners in the household [v]

Enter New Begin Month: MM / YYYY [v] [e]

Individual Sequence Updated on or before MM / DD / YYYY [v] [e]

Add Case Comment Cancel Previous Next

EFT is an option for Checking, Savings and Prepaid Debit Card Assets. New design supports verification of EFT account during W-2 review

Design eliminates the need for manual maintenance and upkeep of financial institution information

Current Page – AILW W-2 Learnfare Monitoring

AILW	W-2 LEARNFARE MONITORING	10/28/15 10:50
CASE: 2002917329	WORKER: XCT266	XCT266 K CLOUGH
LAST UPDATED: 06 18 15	CASE STATUS: OPEN	CASE MODE: ONGOING
PARTICIPATION PERIOD: 2015-06-16 THRU 2015-07-15		
ISSUANCE MONTH: 201508		

DC	PIN	NAME	LF	PEN	GEN	CEAP	CUR/PR	YEAR
			STS	CD	CEAP	DATE	SEM	
—	2008177769	DAU	ALERT404-THR	WST	—	N	—	—

PF16: REFRESH

NEXT TRAN: _____

PARMS: 2002917329

$$MA + a$$

10/024

School Enrollment Page with Learnfare Monitoring Information (AILW)

Supports expansion of Learnfare by adding a Learnfare status (WSP School Related Problems), relating to children with school related problems that impact parental W-2 participation

Decrease data collection by removing unnecessary fields

Streamlines data collection process by collecting Learnfare information with other school related information

Enforces proper verification of School Enrollment status for Learnfare

School Enrollment Cancel Reset Total: 1

Effective Period
* Begin Month: 04 / 2016 Last Updated: 04/05/2016

Individual Information
* Individual: CHILD TREE 6F DAU
* Highest Level of Education Completed: 001 - 1ST GRADE COMPLETED
* High School Graduation Status: NOT - NOT GRADUATED Verification: NQ - NOT QUESTIONA
* Enrollment Status: FU - FULL TIME Verification: NQ - NOT QUESTIONA
Type of Educational Institution: EL - ELEMENTARY
* Student FoodShare Eligibility Reason: Verification:
* School District: School Name: Expected Date of High School Graduation: MM / DD / YYYY Verification:
* Meets Caring for Dependent Children Requirement:

Enter New Begin Month MM / YYYY Go

W-2 Learnfare Monitoring
Effective Period
Delete Reason: Last Updated: 04/05/2016

Learnfare Details
* Learnfare Status: WST - STUDENT IN GOOD STANDING Verification: ? - NOT YET VERIFIED
Penalty Code: AR - AGENCY FORM
Issuance Month: 05/2016
Participation Period: 03/16/2016 - 04/15/2016
ED - EDUCATIONAL DOCUMENT
NV - NOT VERIFIED
OW - OTHER ACCEPTABLE WRITTEN STATEMENT
SR - SCHOOL RECORDS
WS - WRITTEN STATEMENT FROM OTHER SOURCE

Individual Updated on or before
CHILD TREE 6F DAU MM / DD / YYYY Go

Add Case Comment Cancel Previous Next

Referrals and Managing Placement

Current Page – AIWP Work Programs Referral/Action

AIWP WORK PROGRAMS REFERRAL/ACTION 01/02/15 14:25
CASE: 7002730274 WORKER: XCT266 XCTA5B R NURANI
LAST UPDATED: 01 02 15 CASE STATUS: OPEN CASE MODE: ONGOING

-----W-2-----
NUM NAME CASE CAT SEQ RG EXMP WP
CD RSN OFF
01 MITCH T 7002730274 WW C 01 M 1581
PRIOR DETER. ON 12 30 14 M 1581

02 RICHA T 7002730274 WW C 01 M 1581
PRIOR DETER. ON 12 30 14 M 1581

03 BABY T 7002730274 WW C 01 E C6 1581
PRIOR DETER. ON 12 30 14 E C6 1581

-----INDIVIDUALS-----
01 MITCH T (PP) 02 RICHA T (WIF) 03 BABY T (SON)

PF24: PROCESS THIS PAGE

NEXT TRAN: _____ PARMS: 7002730274_____

Work Programs Referral/Action Page (AIWP)

Page will require all individuals that should be referred to be referred

Conveniently displays eligibility, referral and enrollment status to increase worker awareness

Work Programs Referral/Action Cancel ☐ Reset

Work Programs Referral Information

Name	Confirmed Eligibility Results	Enrollment Status	Send Referral	Action Needed
PP	WWC - OPEN - ELIGIBLE ADULT	ENROLLED - 1582		TRANSFER VIA WPWI

Learnfare Referral Information

Name	Confirmed Eligibility Results	Enrollment Status	Send Referral	Action Needed
	WWC - OPEN - ELIGIBLE CHILD	NOT ENROLLED	<input checked="" type="checkbox"/> FOR OFFICE 0	MUST REFER

Add Work Program PIN Comment Cancel ☐ Previous Next

Prevents unnecessary referrals when an individual moves between Milwaukee agencies

Provides user-friendly instruction for worker action

Current Pages – WPWW Wisconsin Works Information & WPFR Work Programs Closure Reasons

```
WPWW                WISCONSIN WORKS INFORMATION          01/02/15 14:29
CASE: 7002730274    XCTA5B R NURANI
LAST UPDATED: 01 02 15
DC:  __             SEQ NUM: 001

CASE MANAGER: XCT266    FEP-ID: XCTA5B    PRIMARY WORKER: XCT266

    INITIAL W-2 ELIGIBILITY DATE: 12 29 2014
    W-2 BEGIN DATE: 12 30 2014           W-2 END DATE:  __  __  __

    PARTICIPANT PIN: 7007940862
        NAME: RICHA            TUMBLER

    PLACEMENT: W2T    W-2 TRANSITION JOB
    PLACEMENT BEGIN DATE: 12 30 2014    PLACEMENT END DATE:

-----INDIVIDUALS ELIGIBLE FOR PLACEMENT-----
NAME: MITCH            TUMBLER            PIN: 7007940846

NAME: RICHA            TUMBLER            PIN: 7007940862

PF13 NEW EPISODE
NEXT TRAN:  __        PARMS: 7002730274
```

```
WPFR                WORK PROGRAMS CLOSURE REASONS        01/02/15 14:36
CASE: 0002629003    XCTA5B R NURANI
PRIMARY PERSON NAME: TEST            TMJ-RFA

PARTICIPANT PIN: 9007768549
PARTICIPANT NAME: TEST            TMJ-RFA

PLACEMENT: CSJ        W-2 END DATE: 12 29 2014

DC:  __             LAST UPDATED: 12 30 2014

FAIL RSN 1: 643 YOUR W-2 SERVICES ARE ENDING, CONTACT YOUR W-2 WORKER

FAIL RSN 2:  __

NEXT TRAN:  __        PARMS: 0002629003
```


Placement Page With Closure Reason Information (WPWW/WPFR)

Selection of placement is simplified by only displaying placements available for W-2 Target Type

Allows convenient viewing of historical placement information for the episode

Allows worker to set a future placement of up to 10 days for better case management planning and to minimize overpayments.

W-2 Placement Mock-Up Current Date: 08/12/2015
Cancel ☐ Reset

Record Management

Last Updated: 07/01/2015 Episode Number: 1

Delete Reason:

Financial Employment Planner

Current FEP ID: MIKE JONES (ABC123)

Reassign FEP ID:

W-2 Episode

Initial W-2 Eligibility Confirmation Date: 03/01/2015

Episode Begin Date: 04/01/2015 Episode End Reason 1: 044 - YOU DO NOT LIVE IN THE W-2 GEOGRAPHICAL AREA

Episode End Date: 06/01/2015 Episode End Reason 2: 136 - YOU HAVE LOST CONTACT WITH THE AGENCY

219 - AN ADULT IN FAMILY FAILED TO COMPLETE JOB SEARCH ACTIVITIES

558 - YOUR EMPLOYABILITY PLAN HAS EXPIRED

Individual Placement Information

Individual: CMC - CASE MGMT CARETAKER OF NEWBORN
CMD - CASE MGMT DENIED EXTENSION
CMF - CASE MGMT FOLLOW UP
CMJ - CASE MGMT SVC FOR JOB READY IND
CMU - CASE MGMT SVC FOR WORKING IND
CS1 - 1/3 COMMUNITY SERVICE JOB
CS2 - 1/2 COMMUNITY SERVICE JOB
CS3 - 2/3 COMMUNITY SERVICE JOB
CSJ - FULL COMMUNITY SERVICE JOB
TMP - TEMP CUSTODIAL PARENT
W2T - W-2 TRANSITION JOB

EFT on File: Account Holder: JANE DOE
Account Type: CHECKING
Account Number: 123456789
Routing Number: 987654321

Individual	Placement	Begin Date	End Date	Invalid
JANE DOE 35F	CS2 - 1/2 COMMUNITY SERVICE JOB	07/01/2015		
JANE DOE 35F	CS1 - 1/3 COMMUNITY SERVICE JOB	04/01/2015	06/30/2015	

Future Placement Information

Individual: JANE DOE 35F

Placement: CSJ - FULL COMMUNITY SERVICE

Placement Begin Date: 08/20/2015

Episode Updated on or before: MM/DD/YYYY

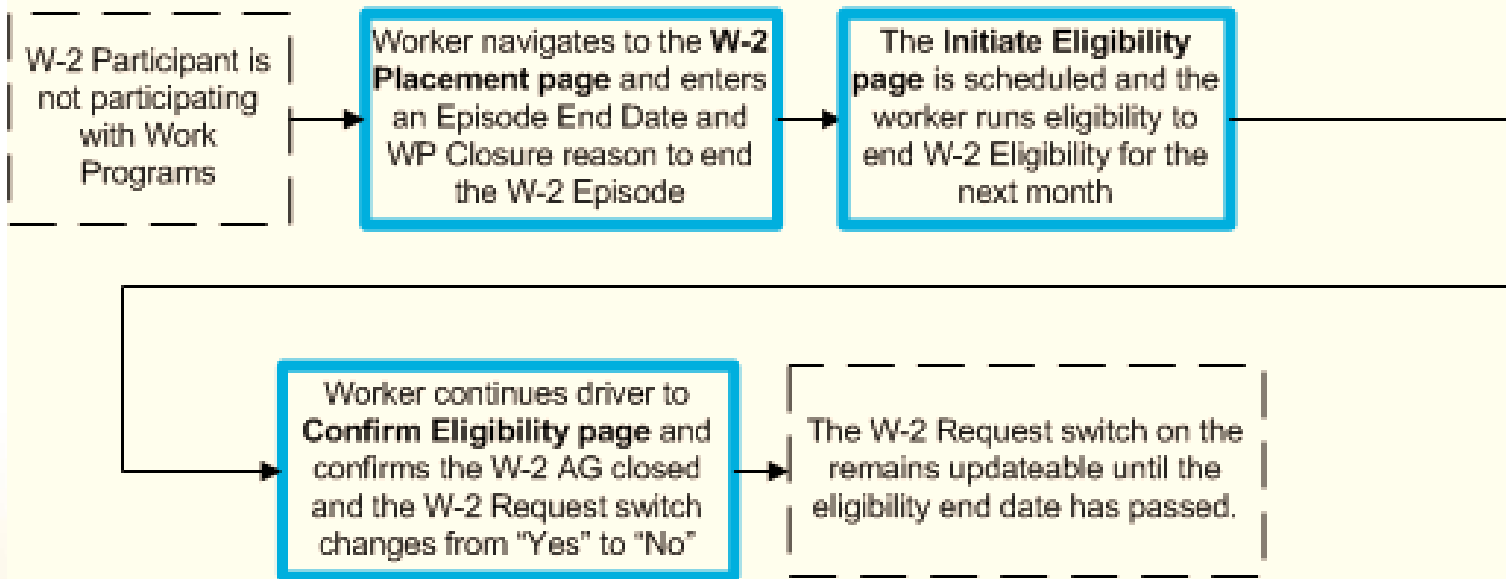
Combine episode begin and end functionality into a single screen and no WP closure reason will be required when a case is closing due to an eligibility reason.


Future end dating will be supported up to the last day of the last month Eligibility is open.


Displays EFT information for individuals in paid placements

Work Program Closure Scenario

Placement Closure Flow - Scenario 1: Individual Is not participating with Work Programs



 Informational

 CWW Action

Current Page – WPPS W-2 Placement Summary

```
WPPS                                W-2 PLACEMENT SUMMARY                                01/02/15 14:32
CASE: 7002730274  OFFICE: 1581  COUNTY: 40                                XCTA5B R NURANI
CASE MANAGER: XCT266  CURRENT FEP ID: XCTA5B  PRIMARY WORKER: XCT266

  PIN          W-2 UPDATED      PLCMT  *-----W2-----*  *-----PLACEMENT-----*
  NUMBER       SEQ DATE         CODE   BEG DATE   END DATE   BEG DATE   END DATE
-----
  7007940862    1 01 02 2015 W2T      12 30 2014              12 30 2014
  7007940846    1 12 30 2014 CSJ      12 30 2014              12 30 2014 12 29 2014

-----INDIVIDUALS-----
7007940846 MITCH      T  7007940862 RICH      T

PF 13 WPPA                                PAGE: 1
NEXT TRAN: _____ PARMS: 7002730274_____
```

Placement Summary Page (WPPS)

W-2 Placement Summary Mock-Up Cancel Reset

Placement Details									
Episode	W-2 Episode Begin Date	W-2 Episode End Date	Del Rsn	Individual	Placement	Placement Begin Date	Placement End Date	Invalid	
3	04/01/2015			JANE DOE 35F PP (0123456789)	CSJ	07/01/2015			
					CS1	06/01/2015	06/30/2015		
				JOHN DOE 38M (0123453214)	CS2	05/01/2015	05/31/2015		
					JANE DOE 35F PP (0123456789)	CS1	04/01/2015	04/30/2015	
1	10/01/2014	12/31/2014		JANE DOE 35F PP (0123456789)	CS3	12/01/2014	12/31/2014		
					CS1	11/01/2014	11/30/2014		
					CSJ	10/01/2014	10/30/2014		

Updated on or before Go

Add Case Comment Cancel Previous Next

Allows worker to easily view all past episodes and placements for the case

W-2 Episode Summary Details Mock-Up

Episode Details						
Episode: 3		Delete Reason:				
Episode Begin Date: 04/01/2015		Episode End Date:				
Placement Details						
Individual	Placement	Placement Begin Date	Placement End Date	Updated Date	FEP ID	Invalid
JANE DOE 35F PP (0123456789)	CS2	07/01/2015		07/01/2015	XYZ123	
	CS1	06/01/2015	06/30/2015	06/01/2015	XYZ345	
	CS3	06/01/2015	05/31/2015	06/01/2015	XYZ345	Yes
JOHN DOE 38M (0123453214)	CS2	05/01/2015	05/31/2015	05/01/2015	XYZ123	
JANE DOE 35F PP (0123456789)	CS1	04/01/2015	04/30/2015	04/01/2015	XYZ123	

Close

Invalid column allows workers to easily differentiate between valid and invalid placements

Current Page – WPTP Two Parent Participation

```
WPTP                                W-2 TWO PARENT PARTICIPATION      01/02/15 14:37
                                      XCTA5B R NURANI

CASE: 7002730274                    LAST UPDATED: 12 30 2014
EFF MMCCYY: 122014

1.  ARE TWO ELIG ADULT PARENTS WITH A CHILD IN COMMON PRESENT IN W-2 AG ?  Y

2.  IS A PARENT A DISABLED ADULT FOR W-2 ?                                  N
2A.      PIN NUM OF DISABLED ADULT : _____

3.  IS A PARENT CARING FOR A SEVERELY DISABLED CHILD IN THE W-2 AG ?      N
3A.      PIN NUM OF CARETAKER PARENT: _____
3B.      PIN NUM OF DISABLED CHILD  : _____
-----

4.  TWO PARENT HOUSEHOLD RESULTS:                                           Y
-----

5.  IS CHILD CARE AUTHORIZED ?                                             N
6.  WEEKLY REQUIRED FAMILY PARTICIPATION HOURS: 35
-----INDIVIDUALS-----
7007940846 MITCH T  7007940862 RICHA T  7007940871 BABY  T

PF13: NEW EPISODE   PF24: PROCESS SCREEN OR ENTER
NEXT TRAN: _____ PARMS: 7002730274_____
BRY - PRESS ENTER KEY TO CONFIRM AND THEN PF24 TO PROCESS
```

W-2 Two Parent Participation Page (WPTP)

Will display Yes when 2 EA's, with no disabled parent or caring for disabled child.

Will display Yes when child care is authorized based on CWW CC results.

Number of hours is system calculated based on the two parent household requirements.

W-2 Two Parent Participation Mock-Up Cancel ☐ Reset

Effective Month

Begin Month: / Last Updated: 12/30/2014

Two Parent Household Information

Are Two Eligible Adult Parent With a Child In Common Present In W-2 AG? **Yes**

Is a Parent a Disabled Adult For W-2? Disabled Adult:

Is a Parent Caring For a Severely Disabled Child In The W-2 AG? Caretaker Parent:


Disabled Child:

Results

Two Parent Household Result: **Yes**

Is Child Care Authorized? **No**

Weekly Required Family Participation Hours: **35**

Updated on or before 

Cancel ☐ Previous Next

Current Page – WPPA W-2 Potential Payment Amounts

WPPA		W-2 POTENTIAL PAYMENT AMOUNTS			01/02/15 14:31	
					XCTA5B R NURANI	
CASE: 7002730274						
PP NAME: MITCH		TUMBLER				
PARTICIPATION BEGIN DATE		PARTICIPATION END DATE		ESTIMATED PAY DATE	GROSS PAY AMOUNT	PRORATED PAY AMOUNT
						PLACEMENT
12 30 2014		12 31 2014		01 10 2015	608.00	39.00
01 01 2015		01 15 2015		01 31 2015	608.00	294.00
01 16 2015					608.00	W2T
</						

W-2 Potential Payment Amounts Page (WPPA)

CARES Worker Web User ID: XCTA5U User Name: D BALAR Quick Select: CASE/RFA Go Help Logout
SYSTEMS Primary Person: SMART WATER 35M PP Case: 1002751217 Status: Closed Mode: Ongoing 3.5 06/24/2015
Action Items (1) Documents (0) Discrepancies (0) Work Items (0)

W-2 Potential Payment Amounts Mock-Up Cancel

Participation Begin Date	Participation End Date	Estimated Pay Date	Gross Pay Amount	Prorated Pay Amount	Placement
05/16/2015	06/15/2015	07/01/2015	\$653.00	\$337.00	CSJ - FULL COMMUNITY SERVICE JOB

Cancel Previous Next

Potential payment amount and information will now be included in the placement notice.

Current Page – WPHB W-2 Hold Benefit

WPHB	W-2 HOLD BENEFIT	10/28/15 10:54
CASE: 4003035941	FEP: XCTF45	XCT266 K CLOUGH
		LAST UPDATED:

HOLD BENEFIT? _

----- HOLD BENEFIT REASON -----

NEXT TRAN: _____ PARMS: 4003035941_____

MA + a 23/013

W-2 Hold Payments Page (WPHB)

W-2 Hold Payments

Mock-Up

Cancel ☐ Reset

W-2 Hold Payments

* Does the participant want his/her payments held at the agency? Last Updated:

Add Case Comment

Cancel ☐ Previous Next

Support policy that requires that W-2 checks are held at the agency only at the participants request. A new letter will be triggered to notify the participant when paymentss are being held and when they will no longer be held.

CMF Eligibility Improvements

Supporting CMF Placement Eligibility Criteria on Initiate Eligibility Page

Initiate Eligibility Cancel ☐ Reset

■ Page Completion Status: All pages are complete, you may proceed to eligibility by clicking the 'Next' button.

What would you like to do?

☒ Run Eligibility ☐ Ignore W-2 income and asset tests to allow CMF Placement to begin

☐ Run Eligibility with Date

Effective: MMDDYYYY

Add Case Comment Cancel ☐ Previous Next

The screenshot shows a web form titled 'Initiate Eligibility'. At the top right are 'Cancel' and 'Reset' buttons. Below the title bar, a status message states: 'Page Completion Status: All pages are complete, you may proceed to eligibility by clicking the 'Next' button.' The main section is titled 'What would you like to do?'. It contains two radio buttons: 'Run Eligibility' (which is selected) and 'Run Eligibility with Date'. To the right of the 'Run Eligibility' radio button is a checkbox labeled 'Ignore W-2 income and asset tests to allow CMF Placement to begin'. Below the radio buttons is an 'Effective' date field with input boxes for MM, DD, and YYYY, followed by a calendar icon. At the bottom of the form are an 'Add Case Comment' button, another 'Cancel' button, and 'Previous' and 'Next' navigation buttons. Two red callout boxes point to the checkbox. The first callout box states: 'Allows FEP to perform specialized eligibility run ignoring income and assets'. The second callout box states: 'Allows W-2 eligibility to remain open when transitioning to CMF placement and avoids sending an incorrect W-2 closure notice'.

Allows FEP to perform specialized eligibility run ignoring income and assets

Allows W-2 eligibility to remain open when transitioning to CMF placement and avoids sending an incorrect W-2 closure notice

W-2 Budget Screen

W-2 Budget Cancel Reset

Gross Income

Assistance Group Overview

Assistance Group: **WW C - W-2 FOR OLDEST MINOR CHILD WITH CUSTODIAL PARENT** Sequence: **1**

Eligibility Begin Date: **07/01/2015** Eligibility End Date:

Determination Date: **06/06/2015**

Result

Assistance Group Status:	0 - OPEN	Eligibility Status:	PASS
W-2 Gross Income Test:	PASS	W-2 Asset Eligibility Test:	PASS
Income/Asset Test Skipped:	YES	Income Verification Indicator:	PENDING
		Income Test Result:	PASS
		Asset Verification Indicator:	PENDING
		Asset Test Result:	PASS

Gross Income Test

Gross Earned Income:	\$ 695.21		
Alien Sponsor Deemed Income: +	—	Caretaker Supplement Benefit Amount:	\$ —
Unearned Income: +	550.00	Other Unearned Income: +	550.00
		SISS/SISE/CTS Recoupment: -	—
		Unearned Income:	\$ 550.00
Assigned Child Support: +	\$ —		
Countable Gross Income:	\$ 1,245.21		
Assistance Group Size:	2		
Gross Income Limit:	\$ 1,312.00		

Asset Eligibility Test

Liquid Assets:	\$ 100.00	Real Property Assets:	\$ 200.00		
Other Assets: +	401.00	Personal Property Assets: +	125.00	Liquid Assets:	\$ —
		Life Insurance Assets: +	25.00	Real Property Assets: +	—
		Burial Assets: +	51.00	Personal Property Assets: +	—
		Alien Sponsor Deemed Assets: +	—	Life Insurance Assets: +	—
				Burial Assets: +	—
				Alien Sponsor Deemed Assets:	\$ —
		Other Assets:	\$ 401.00		
Countable Vehicle Assets: +	175.00	Vehicle Assets:	\$ 10,175.00		
		Alien Sponsor Vehicle Assets:	—		
		Countable Vehicle Assets:	\$ 175.00		
Total Counted Assets:	\$ 676.00				
Asset Limit:	\$ 2,500.00				
Amount Over Limit:	\$ —				

Added a new expandable breakdown of the CMF override eligibility results.

New Indicator shows when Income and Asset tests have been skipped for eligibility determination for CMF placement

W-2 Placement Page prevents Paid Placements when income and assets are ignored

After confirming eligibility that ignored income and assets, CMF will be the only placement option available (it must be selected)

Worker will have the ability to enter Work Program PIN based comments that will transfer to Mainframe

W-2 Placement Mock-Up Current Date: 07 / 01 / 2015

Cancel ☐

Record Management

Last Updated: 07/01/2015 Episode Number: 1

Delete Reason:

Financial Employment Planner

Current FEP ID: MIKE JONES (ABC123)

Reassign FEP ID:

W-2 Episode

Initial W-2 Eligibility Confirmation Date: 03/01/2015

Episode Begin Date: 04/01/2015 Episode End Reason 1:

Episode End Date: Episode End Reason 2:

Individual Placement Information

Individual: JANE DOE 35F EFT on File: Account Holder: JANE DOE

Placement: **CMF - CASE MANAGEMENT FOLLOW UP** Account Type: CHECKING

Placement Begin Date: Account Number: 123456789

Routing Number: 987654321

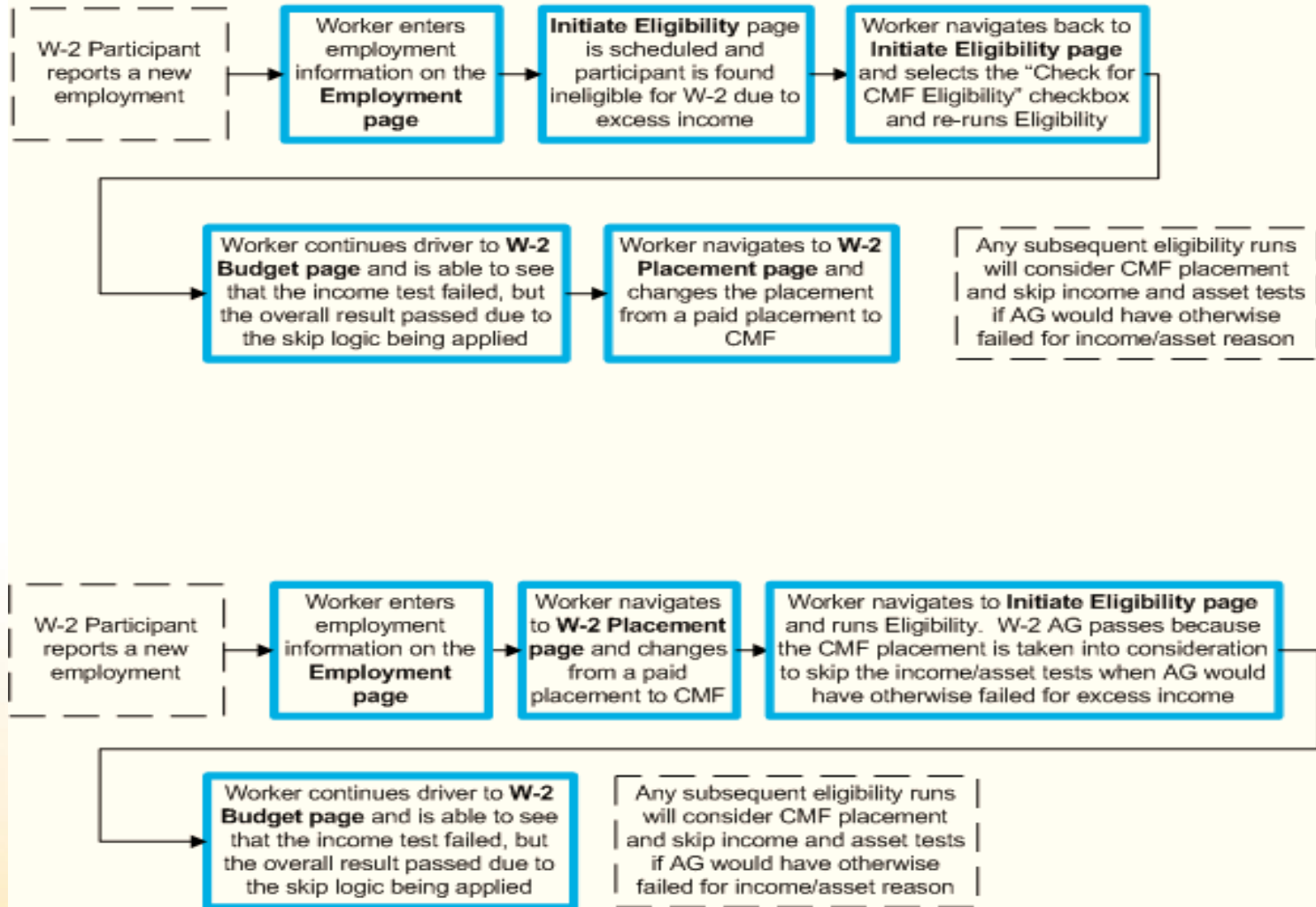
Individual	Placement	Begin Date	End Date	Invalid
JANE DOE 35F	CMF - CASE MANAGEMENT FOLLOW UP	07/01/2015		
JANE DOE 35F	ARP - AT RISK PREGNANCY	04/01/2015	06/30/2015	

Cancel ☐

The Check for Non-CMF Placement Eligibility button is enabled only when any of the current or future month(s) eligibility was overridden for CMF purposes. Clicking this button will disregard the current CMF placement, cause CWW not to override the eligibility result (i.e., include income and assets in the eligibility determination), and schedule the Initiate Eligibility page.

CMF Worker Flow Scenarios

CMF Flow - Scenario 1: Worker is not sure if new employment will put participant over W-2 income limit.



Other Improvements

Other Impacted Pages / Functionality

Case Summary Reset

Summary Information

Primary Person: **BUCKY BADGER 36M PP** W-2 Placed Participant: **BUCKY BADGER 36M**

Contact Information

County of Residence: **40 - MILWAUKEE COUNTY**
Household Address: **PO BOX 411
W3236 WOLF RIVER DRIVE
MILWAUKEE WI 532010411** Alternate Address:
Phone:
Phone:

Office / Worker Information

Eligibility Office: **MILWAUKEE W-2 ELIG - EAST CENTRAL (5612)** W-2 Work Program Office: **MILWAUKEE W-2 WP - NORTHERN/ROSS (1581)**
County / Tribe: **40 - MILWAUKEE COUNTY** W-2 Geographical Area: **01 - MILWAUKEE NORTHERN**
IM Consortium: **STATE CONSORTIUM** FEP: **RYAN COMPTON (XCT26)**
Assigned Worker: **KEVIN CLOUGH (XCT26)** Caseload: **3933**

Case Information

Language: **E - ENGLISH** W-2 Placement: **CS1 - 1/3 COMMUNITY SERVICE**
Last Review Date: **04/05/2016** Next Review Date: **10/31/2016**
Case Closed Date: Case Web Status: **WEB**

Associated RFA Information / ACCESS Application Information

Number	Agency	Contact Method	RFA Status	Contact Date	ACCESS App	ACP Status	Summary
3003112732	40	Walk-in	INDIVIDUALS PROCESSED	03/21/2016			

What would you like to do?

Workflow Options	Case Maintenance
<input checked="" type="radio"/> Continue with Driver / Navigate Through Completed Pages	<input type="radio"/> Reactivate Case
<input type="radio"/> Add Person	<input type="radio"/> Transition Mainframe Case to Web Case
<input type="radio"/> Process Review or Renewal	<input type="radio"/> Initiate, Resume, or Terminate Simulation
<input type="radio"/> Record New Group Level Program Request	<input type="radio"/> Change Primary Person
<input type="radio"/> Process Group Level Program Request	<input type="radio"/> Make Case Confidential
<input type="radio"/> View / Record Six Month Report Actions	<input type="radio"/> Transfer Case
<input type="radio"/> Process linked ACCESS application	<input type="radio"/> Begin Intake Interview for Asset Assessment Case

Enter Begin Month for New Data: MM / YYYY

Add Case Comment

Adding W-2 Placed Participant Information

Adding W-2 Work Program Office for worker reference

Adding W-2 Placement for worker reference

Page cannot be completed by the worker if there are up-front activity requirements and a Work Program referral has not been sent

W-2 Up-Front Activity Requirements Cancel Reset

Effective Period

Begin Month: 02 / 2011 End Month: MM / YYYY Last Updated:

Delete Reason:

Additional Information

Sequence: 0

FEP Interview Date: 01 / 13 / 2011

FEP ID: FEP Name: **DHARMESH BALAR**

Are there any up-front activity requirements? Yes

Have the up-front activity requirements been met? Y - Yes



Sequence Updated on or before MM / DD / YYYY

Add Case Comment Cancel Previous Next

New Interview Type for CMF and CMU Eligibility Reviews

Application / Review Interview Details Cancel ☐ Reset

Request / Review Date	Program	Mode	Interview Type	Last Updated
03/03/2016	WW - W-2	Review	<div>C - CMF/CMU Phone Review F - Face to Face N - No Review</div>	

From Date MMDDYYYY  To Date MMDDYYYY  Go

Add Case Comment Cancel ☐ Previous Next

PIN Level Case Comments

Work Program Comment window will be pop up on relevant Work Program CWW pages to allow workers to add individual (PIN) level comments that will be viewable in Mainframe PIN Comments.

Add Work Program Comment Mock-Up Reset

Add Comments

Individual: YOUNG PARENT 20M PP Date Entered: 09/18/2015 Entered By: XCTR24

Comment:

Current Size = 0 characters (250 characters max.)

Cancel Save

Drop down will allow worker to identify which Work Program Individual the comment is relevant to

PIN Based Comments will be available to Add on CWW Pages:

- W-2 Placement Page
- W-2 Upfront Activity Requirements Page
- Two Parent Participation Page
- Work Programs Referral/Action Page
- W-2 Placement Summary Page

Tidbits & Tips for Implementation

- CMF cases must meet Non-Financial Eligibility which includes eligibility reviews. All agencies should start scheduling eligibility reviews and completing them to prepare for the CWW changes to support CMF eligibility determination.
- CMF cases that are open greater than 12 months on June 26, 2016 will be system closed and a nightly batch will close down CMF cases from that point forward. New policy will limit CMF placements to 12 months.
- CMC cases after June 26, 2016 will have the placement system ended if CMC placement is greater than 56 days after the child's birth and no other placement has been entered. Note: CMC Cases that will be at 56 days between June 19-June 30 will not be auto close until July 1, 2016 but will have the end date backdated to the 56th day.
- CMF cases that have eligibility closed on June 26th but the placement still open less than 12 months, will remain open in CMF until December 31, 2016 or may close sooner if the FEP ends the placement or they reach 12 months to allow POP claims to be completed.
- EFT payments will continue until December 1, 2016 from information entered on WPET prior to June 26, 2016. However, if the agency updates the asset page in CWW to include the account number and it matches the account type and number a conversion will occur on June 26th that will not require the FEP to do any further action. If the account information is not entered in CWW to correspond with the EFT information on WPET, the FEP will have until December 1st to update the Asset page. All Checking and Savings should be able to be updated prior to implementation.

Tidbits & Tips for Implementation Cont.

- **A new EFT Report will be available in the WebI folder DCF / WISDOM / Employment Programs / Wisconsin Works / Caseload Reports, beginning April 4, 2016. This report will be available biweekly through December 1, 2016 to identify which cases have EFT's that are not currently entered on the Asset page in CWW.**
- **Two New Reports will be created to track cases with no W-2 eligibility but open placements.**
 - **The first report will identify which placements will be closed at the end of the month because of W-2 eligibility ending. This report will be a weekly report produced after adverse action through the end of the month.**
 - **The second report will identify which placements were closed by the batch process on the last day of the prior month due to no open eligibility in W-2. This report will be a monthly report and will be produced the night of the 5th business day of the month following the placement closure. This report will be available for the first time on September 9, 2016.**
- **The current CMC report will be updated to replace the section that identifies all CMC cases that are greater than 56 days and replace it identifying all cases that were system closed on the 56th day. Additionally we will provide information identifying all cases currently in CMC that have a pending future date.**
- **Classroom training will be available in June and all workers should attend. Registration will begin in April.**

Correspondence Changes

- Modern formatting
- Stored in ECF
- Customer viewable through ACCESS
- Redundancy eliminated by combining information with Placement Letter, when possible

NOTICE	Description / Purpose	Identified Changes	Expression Status
NEW	Notify participant when a placement ends and no additional placement has been added.	Create a new notice that will be triggered when the last W-2 placement ends for that episode.	Not in Expression – will be at implementation
NEW	Inform participant that they have opted for their W-2 payments to be held for distribution and pickup at the W-2 agency	Create a new notice that is triggered when the Hold Payments indicator is selected. Only send if hold payment is added after paid placement started or goes from unpaid to paid placement otherwise will be incorporated in the AELR.	Not in Expression – will be at implementation .
NEW	Inform participant that they have opted for their W-2 payments to no longer be held for distribution and pickup at the W-2 agency	Create a new notice that is triggered when the Hold Payments indicator is turned off while the case is in a paid placement.	Not in Expression – will be at implementation.
AELR	W-2 Placement Letter	References to AFDC still in letter. Reduce language and add section for paid placements that will notify participant how their W-2 check will be distributed (EFT, Check, vendor payment or HP). Will include potential payment amount if applicable.	Not currently in Expression – will be converted for implementation of MPOWR.

Correspondence Changes Continued

NOTICE	Description / Purpose	Identified Changes	Expression Status
AEO4	Wisconsin Works EFT Begins	Add language to indicate when participant will receive their first W-2 payment by EFT. Add prepaid debit as account type. May want to indicate in letter that any additional payments in a month will be mailed as a check. Will only be triggered if EFT is not indicated at the time of the paid placement – otherwise incorporated in AELR. Remove bank name and add routing number to letter.	Currently in Expression
AEL4	Wisconsin Works EFT Ends	Will be triggered anytime the switch is changed to 'No' while the case is in a paid placement.	Currently in Expression
AEO3	Wisconsin Works Vendor Payment Begins	Only send if vendor is added after paid placement started or goes from unpaid to paid placement otherwise will be incorporated in AELR.	Currently in Expression
AELH	Wisconsin Works Vendor Payment Ending	Will be triggered anytime the switch is changed to 'No' while the case is in a paid placement.	Currently in Expression
APLF	Learnfare Case Management Assignment	Policy will need to review for accuracy – Update and correct <u>Learnfare</u> sanction language.	Not currently in Expression – will be converted for implementation of MPOWR.
APLG	Wisconsin Works Learnfare Penalty Notification	Policy Review	Not currently in Expression – will be converted for implementation of MPOWR.
WPAP	ARP Pregnancy Not Eligible	Eliminate Notice	n/a